**Carolinas Cash Adventure Speakers – May 2018**

**May 21, 2018**

**Richard Kaglic 8:00AM – 9:00AM**

Rick Kaglic is the Senior Regional Economist at the Federal Reserve Bank of Richmond serving the Carolinas. He joined the Research Department in 2009 and is responsible for analyzing regional economic conditions and developments, as well as educating the region's diverse constituents on the role of the Federal Reserve and its District Banks. Prior to joining the Richmond Fed, Rick served as a Senior Economist for Eaton Corporation, a diversified manufacturing firm headquartered in Cleveland, OH; as Chief Economist for the Washington State Employment Security Department; and spent eleven years as Senior Business Economist for the Federal Reserve Bank of Chicago. Rick is a graduate of Leadership North Carolina Class 23 and has served in leadership roles in the Chicago and Cleveland Associations for Business Economics and provided economic analysis for Governor’s Economic Advisory Councils in four states. He completed both his undergraduate and graduate work at Youngstown State University with specializations in regional and urban economics.

**Chris Block 9:15AM – 10:15AM**

During his 20+ year career in the banking industry, Chris gained expertise in personal banking, business banking, and treasury services spanning the national, regional and community banking landscapes. His passion for developing financial products and services has grown over time and is the driving force behind SafeDeposit. Chris’ commitment to innovation and creating cutting edge FinTech products is core to SafeDeposit’s product and service offerings. Chris has filed two patents with the United States Patent and Trademark Office and continues to investigate and implement new products and processes into the FinTech marketplace. He earned a Bachelor of Science in Business Administration from Viterbo University.

**Neal Herring 9:15AM – 10:15AM**

Neal Herring, Treasury and Financial Operations Advisor at Vizant delivers value to clients in the form of cost reductions and operational efficiency.

He graduated from Penn State in 2013 with two degrees, Bachelors in Finance and Bachelors in Economics while playing Division 1 Baseball all 4 years. While at school, Neal participated in multiple Wounded Warrior events and worked with local charities to maintain historical houses. After school, he immediately began working at JPMorgan as a Financial Controller for EMEA Exotic products. Neal moved to Barclays in 2015 to manage their USD Intraday Liquidity. While there, using innovative and analytical strategies, he managed to reduce millions in costs to Barclays.

Outside of work, Neal enjoys playing sports including Baseball, Soccer and Golf. He has over 13 years of experience playing and competing with Piano and has produced some of his own original music. Neal and his wife, Amanda, live in West Chester, PA.

**Aeron Sharp 10:30AM – 11:30AM**

Based in Charlotte, Aeron has worked in the financial advisory industry for the past 6 years. Prior, she worked with customers with their merchant processing. Aeron has helped 100’s of clients optimize their payment environment; specifically finding solutions with their cash management and merchant card fees.

**Wes Seeger and David Pierce 10:30AM – 11:30AM**

Wes Seeger – Wes is Director of Foreign Exchange for GPS Capital Markets and is based in Charlotte NC.  Wes has 29 years of experience in foreign exchange markets working with larger to medium sized companies focusing on assisting them in managing their currency risk.  Prior to joining GPS Capital Markets this year, Wes worked for Bank of America Merrill Lynch, Swiss Bank Corporation, First National Bank of Chicago and ABN AMRO.  He holds a B.S. in Financial Management from Clemson University

David Pierce – David has 3 decades of experience in all aspects of foreign exchange, international banking and trade finance. His extensive experience in structuring hedging strategies, multi-tiered transactional exposures, utilizing derivative products makes his advisory services highly demanded by multi-national corporations. David has appeared as an expert on CNBC, and in many business publications such as Wall Street Journal and Bloomberg.

**Tim Worley 11:30AM – 1:15PM**

Tim Worley is a former University of Georgia All-American running back, and was selected by the Pittsburgh Steelers as the seventh overall pick in the first round of the 1989 NFL Draft. He played six seasons in the NFL with the Steelers and the Chicago Bears. He is now co-founder and CEO of Worley Global Enterprises – a communications consulting firm. Through Worley Global Enterprises, Tim travels the country as a John C. Maxwell certified speaker, Life Skills Consultant and certified Human Behavior Consultant to to corporate executives, business leadership, organizational leadership, professional athletes, amateur athletes, men’s groups, recovery centers and ministries.

**Everette Glass 1:30PM – 2:30PM**

Everette has been with Bank of America for 20 years and is currently Director; Senior Treasury Product Sales Specialist. His experience with the bank has included working in project management with various treasury platforms, 6 years as the payments platform manager specializing in domestic and international legacy payment applications and most recently 8 years as a Payments and Integration Product Sales Specialist offering payment platform consultation to both existing and prospective clients. Everette is a subject matter expert on the Bank of America host-to-host and web-based platforms as well as being SWIFT Corporate certified. His current role involves emerging digital payment technologies and trends and working on cutting edge payment solutions.

**Scott Wachs 1:30PM – 2:30PM**

Scott Wachs, Executive Director, is Global Head of Liquidity Product for Morgan Stanley Investment Management. He is responsible for the management, strategy, development, delivery and marketing of short term investment management products including money market funds, ultra-short bond funds and separate accounts. Scott joined Morgan Stanley in 2014 and has over thirty years of financial services experience in a variety of cash and treasury management roles encompassing product management, strategy, finance, operations, service and business management on a global scale. Scott received a MBA from the New York University Stern School of Business and a BA in Economics from Tufts University

**Eric Webb 2:45PM – 3:45PM**

Eric is a member of the BB&T Treasury Technical Product Consulting team.  His primary focus is sharing knowledge with clients and helping with integrated, secure solutions related to Payables, Receivables, and Liquidity functions.  Eric joined BB&T in 2007 with an initial focus on Commercial Card. He has over 15 years of client service and consulting experience.  He previously served as the SME for BB&T’s virtual card payment solution, and his focus the last few years has been on integration, development, and support of paper to electronic conversion as an integral part of BB&T’s Commerce Gateway Payables and Medical Data Lockbox Receivables solutions.  Eric is a proud member of the Wolfpack at NC State University, and is a BB&T Process Master.  He enjoys spending time with his family, scuba diving, and shooting sporting clays competitively and resides in Wilson, NC.

**Doug Robertson 2:45PM – 3:45PM**

Mr. Robertson has over 30 years of experience in Banking, Treasury Management and Finance and is currently Senior Vice President, Fifth Third Bank.  In his current role, he manages the deposit growth initiatives and revenue return for the Payments division of Fifth Third Bank.  He received his undergraduate degree from Cornell University and his MBA from Pace University.

**Tuesday, May 22, 2018**

**Anthony Guide and Ethan Keller 8:00AM – 9:00AM**

As a member of PNC’s International Advisory Services team, Anthony Guide focuses on supporting corporate clients doing business internationally and assists them in formulating strategies to overcome any global challenges they may be facing. Guide has 12 years of overall treasury experience. Prior to joining PNC, he worked for 10 years in corporate treasury at Hay Group, a multinational firm with office locations in 49 countries.

Ethan Keller is currently a Treasury Analyst for ANSYS, Inc, a $BN public engineering simulation software development corporation. ANSYS is headquartered south of Pittsburgh, PA, and has more than 75 strategic sales locations across three continents and a network of channel partners in 40+ countries.

Prior to working for ANSYS, Keller was a member of PNC’s International Advisory Services. There, he focused on supporting corporate clients doing business internationally and assisted them in formulating strategies to overcome any global challenges they may have been facing.

Keller has nearly four years of overall international treasury experience. Prior to joining PNC, Keller worked briefly in Trust and Estate Taxation with Pricewaterhouse Coopers. Keller is a certified treasury professional and holds a BSBA with a dual major in Finance and Accounting.

**Gary Nesbitt and Sims Propst 8:00AM – 9:00AM**

Gary Nesbitt has spent over three decades in the banking and payments industry in a variety of roles. He formed a consulting practice to assist financial institutions and companies with the myriad challenges with payments rules and regulations. He has helped organizations understand and mitigate the risks associated with participating in the various payment systems and establish payment programs that are efficient, effective and compliant with all appropriate rules and regulations.

Gary holds a BA and MBA degree from UNC Charlotte. He is a graduate of the North Carolina Bankers Association School and the South Carolina Bankers Association School. Gary holds the permanent Accredited ACH Professional (AAP) certification from the NACHA. He is active in the North Carolina Treasury Management Association (NCTMA), having served as Secretary and Treasurer. Gary is active in at the national level of American Payroll Association (APA) where he serves on the national APA ACH Committee. He was recognized by APA for his ongoing work on this committee. He speaks at local, regional and national TMA and APA chapter meetings and conferences, as well as for local Bankers Associations and Credit Union groups. Gary has also been an instructor at NACHA’s Payment Institute.

Sims Propst is a Treasury Management Sales Office and Senior Vice President at Park Sterling Bank, a division of South State Bank. Sims has over 35 years of banking experience, seven as a relationship manager with the remainder in Treasury Services. He was most recently with Synovus Financial and, before that, with Wachovia prior to the merger with Wells Fargo. He has served in a variety of Treasury Management roles including sales and product management and product development.

Born in Sumter, SC, he has an undergraduate degree from Wofford College in Spartanburg, SC, and an MBA from Emory University in Atlanta, Georgia. He is active in the Greenville community, having served on several non-profit boards. He currently serves as a board member of the SC Jefferson Awards Association and as an Advisory Board member of A Child’s Haven. He has also served as an Elder at Fourth Presbyterian Church in his hometown of Greenville, SC.

**Steven Shafer 9:15AM – 10:15AM**

Steven Shafer is a Treasury Management Sales Consultant covering the Piedmont Triad region of North Carolina. He provides industry guidance to Wells Fargo commercial banking, technology, media, financial institution and healthcare clients. His background includes: domestic and international treasury management sales, treasury management, treasury operations, ERP integration, revenue cycle enhancement, business process management, and small business management. He has over 20 years’ experience in process management and consulting in both the public and private sector.

Steven holds a BA in Theatre Arts from Brigham Young University and an MBA from Appalachian State University. He is an AFP Certified Treasury Professional, and an Accredited ACH Professional.

**Michael Alfonsi 10:30AM – 11:30AM**

As the managing director of Exela Technologies’ Payments & Financial Process Optimization lines of business, Mr. Alfonsi is the accountable party for Exela’s Payments Strategy, timely product definition and product market fit as well as total client product satisfaction Mr. Alfonsi is the co-coordinator as well as an instructor for The University of North Carolina at Chapel Hill, Kenan-Flagler School of Business’ Treasury Management Program, and The University of California at Berkeley, Haas School of Business Treasury Series. He has served on the Board of Regents of NACHA's annual Payments Institute, as well as a NACHA task force member. Mr. Alfonsi has authored presentations and best practice articles on international treasury management, payments, working capital management, and domestic treasury management, having been published in AFPExchange, Treasury and Risk Manager, CashFlow Magazine, TreasuryPoint.com and Treasury Manager's Report. He holds an M.A., magna cum laude, from LaSalle University in Philadelphia, PA, and earned a certificate in Cash Management from Duke University's Fuqua School of Business.

**Lauren Hood 12:45PM – 1:45PM**

Lauren Hood is Diversity & Inclusion Executive at Bank of America. In this role, she leads strategies, programs and initiatives focused on attracting, developing and advancing the careers of women at Bank of America. As part of her role, Lauren serves on the bank's Investing in Women Leadership Council, comprised of senior executives across the company who act as advisors and champions of our efforts to maximize impact. The Council also provides strategic oversight to the bank’s enterprise and line of business women’s networks, which engage over 30,000 employees around the globe

Lauren earned a Bachelor of Arts in Economics and English with cum laude honors at Duke University, where she was recognized on the Dean’s List and received the Senior Leadership Award. She lives in Charlotte with her husband and two sons.

**Kerry Pope 12:45PM – 1:45PM**

Kerry Pope is an institutional portfolio manager in the Fixed Income division at Fidelity Management & Research Company (FMR Co.), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries.

In this role, he provides strategy and communications to business partners regarding the management of Fidelity Institutional Asset Management® (FIAM®) Liquidity Management Solutions.

Prior to joining Fidelity in 2011, Mr. Pope was senior vice president of liability management at State Street Corporation, Treasury from 2004 to 2008. Previously, he served as senior vice president of global money markets at State Street Corporation, FX Money Markets for ten years. He has been in the financial industry since 1986.

Mr. Pope earned his bachelor of science degree in business administration from the University of New Hampshire and his master of business administration degree in finance investments from Boston University. He is also a CFA charterholder.

**Scott Hogate 2:00PM – 3:00PM**

Scott Hogate joined the Treasury Solutions Group in March, 2016 after spending time as a PNC Sales Officer and an independent Treasury & Financial Consultant. Prior to joining PNC, Scott had recently finished a consulting engagement at Universal Services of America. Based in Santa Ana, hired to identify, analyze and design a traditional treasury function which included bank, account and service justification, the development of a cash forecast as well as process improvements involving the cash conversion cycle.

Scott graduated from the University of Redlands with a Master’s Degree in Business Administration and an undergraduate degree from Chapman University with majors in Finance and Economics. Scott has more than twenty years of practitioner experience in Treasury including earning his Certified Treasury Professional (CTP) designation. He is based in Santa Ana, CA.

**Geoffrey Duke 2:00PM – 3:00PM**

Geoffrey R. Duke has thirty years of experience in the retail, software, business services and insurance industries. He serves as the CEO of a portfolio of companies including SafeDeposit Company, Payentry Financial Services and MPAY, Inc. SafeDeposit Company is a financial technology start-up that offers unique armored car management services and smart safe technologies that improve employee safety, enhance cash flow and provide cloud reporting. Payentry Financial Services provides small and medium sized businesses with high value employee benefit packages at competitive prices. MPAY, Inc. provides software as a service (SaaS) solutions to small and medium sized businesses that manage their workforce transactions from an employee’s hiring, ongoing payroll and benefits management, all the way through to their separation or retirement. Geoffrey earned a Bachelor of Arts in Political Science from Washington & Lee University in Lexington, VA.

**Wednesday, May 23, 2018**

**Rob Hickson 8:30AM – 11:30AM**

Rob Hickson, a partner with BluePointe, LLC, has spent over 29 years in technology consulting and the use of technology to enhance business practices and e-commerce sales. As founder of a leading e-commerce web site focusing on luxury mechanical watches, Rob created a profitable retail business model without using a traditional retail store structure now celebrating its 20th year. Rob worked for eight years with KPMG in both the Raleigh and Brussels, Belgium offices. Rob managed the computer consulting and not-for-profit practices, and served as the US accounting instructor in Belgium. Rob was a principal shareholder in American FundWare, a leader in not-for-profit and governmental accounting software that was purchased by Intuit, Inc of California. Rob is a James M. Johnston Scholar and Phi Beta Kappa graduate of the University of North Carolina at Chapel Hill and is a Silver Medal Winner on the CPA Examination for scoring the second highest grade. Rob is a frequent speaker for the NCACPA, SCACPA, IMA, NC/SC Treasury Management Associations and a number of other industry and corporate conferences and events, focusing on technology driven topics and teaching speaker presentation skills. He has been honored with the Outstanding Conference Speaker Award fourteen times by the North Carolina Association of CPA’s, including this year.